DIGITAL IQ INDEX®

HOME CARE

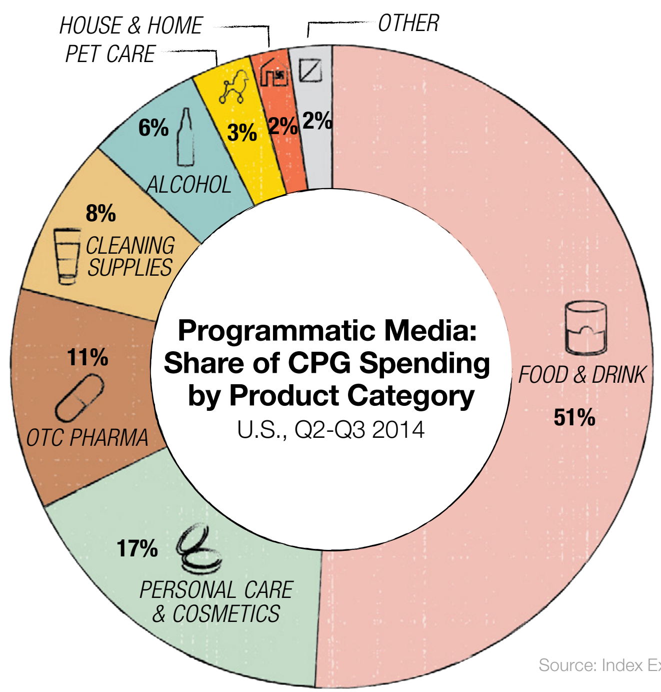
March 18, 2015

Watch the Video

SHIFT

Across Home Care, terrestrial retail accounts for 98 percent of sales.[1] While innovation in product compaction (e.g., high-efficiency "pod" or "pac" formats) helps remedy bulky detergent packaging formats, e-commerce remains a pimple on the retail elephant. Despite the contrast in channel sales, digital investment among CPG firms marches on, claiming 20 to 35 percent of marketing dollars across the sector's bell weathers (e.g., The Clorox Company and P&G).[2] CPG brands are now the second-largest category in programmatic buying (via real-time bidding)[3] and are second in digital video impressions.[4] Starting to size their spend to influence, versus commerce. P&G states half of sales are influenced by digital (10x e-commerce sales).[5]

1. "Industry Overview: Home Care in the U.S.," Euromonitor International, June 4, 2014.
2. "Marketers Look to Digital As Cure-All," Jack Neff and E.J. Schultz, AdAge, February 9, 2015.
3. "Index Quarterly Report, Q3 2014," Index Exchange, December 18, 2014.
4. "Q4 2014 Video Market At-a-Glance," Videology, February 9, 2015.
5. "World's Biggest Advertiser Shifts Focus to Sampling," Jack Neff, AdAge, November 13, 2014.

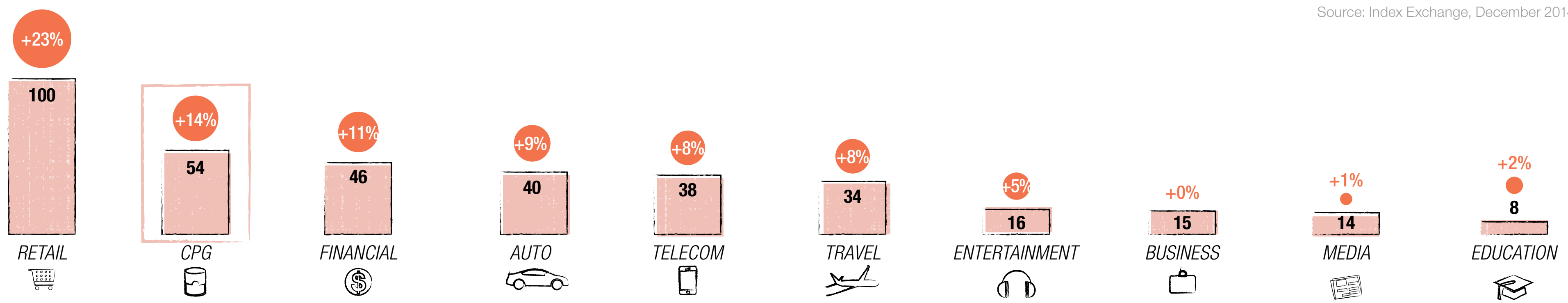


Source: Index Exchange, December 2014

Programmatic Media: Top Sectors in Real-Time Bidding by Overall Spend

U.S., Q2-Q3 2014 ■ Quarterly Change in Spending ■ Index of Ad Spend

Source: Index Exchange, December 2014



Take Two

In the U.S., online grocery sales have doubled since 2009 to $11 billion.[6] After early stumbles (RIP Webvan), today's marketplace is marked by robust infrastructure, heightened competition, and a larger addressable market (i.e., shoppers).[7,8] Among the first product categories to benefit from this disruption is Home Care, with nonperishable items representing a third of online grocery sales.[9]

New channels hold promise, and the transition has shaken the industry. In late 2013, P&G established a partnership with Amazon ("Quantum Tunnel") that let the Seattle firm ship select products directly from P&G's warehouses, reducing shipping costs and delivery time.[10] Target responded by temporarily stripping some big P&G brands of their "category captain" status—reducing brand visibility in sales circulars and aisle placement.[11] Undeterred, P&G continues to work with Amazon to explore new shop-able ad formats.[12]

6. "Online Grocery Sales in the U.S.," IBIS World, December 2014.
7. "America's Most Promising Company: Instacart, the $2 Billion Grocery Delivery App," Forbes.com, January 21, 2015.
8. "The Same-Day War: Amazon, Google And Walmart Race To Bring Your Groceries," Jeff Bercovici, Forbes.com, April 16, 2014.
9. "The staggering challenges of the online grocery business," Sarah Halzack, The Washington Post, January 20, 2015.
10. "Soap Opera: Amazon Moves In With P&G," Serena Ng, The Wall Street Journal, October 14, 2014.
11. "P&G's Pact With Amazon Angers Target," Serena Ng and Paul Ziobro, The Wall Street Journal, Februayr 25, 2014.
12. "Amazon: Shop while you're in the toilet," David Goldman, CNNMoney, December 3, 2014.

Where the Puck is Headed

By skating to where the puck is headed, enterprises including P&G are justifying digital investment.[13,14] The variance in Digital IQ® between Index leaders and peers is evident at the top (web advertising) and bottom (visibility on retailer.com's) of the purchase funnel.

Suppliers realize the importance of strong relationships with 2.0 distribution. On Amazon, Kimberly-Clark and Georgia-Pacific narrowly outperform deep-pocketed P&G, which leads by a wide margin on Walmart.com and Target.com (2014 controversy notwithstanding).[15] In an industry where scale has been leveraged offline to dominate in-store environments, independent, eco-friendly brand Seventh Generation maintains relatively high visibility across e-tailers, and ranks among the top 10 brands in e-merchandising efforts on Amazon.

Digital IQ = Shareholder Value

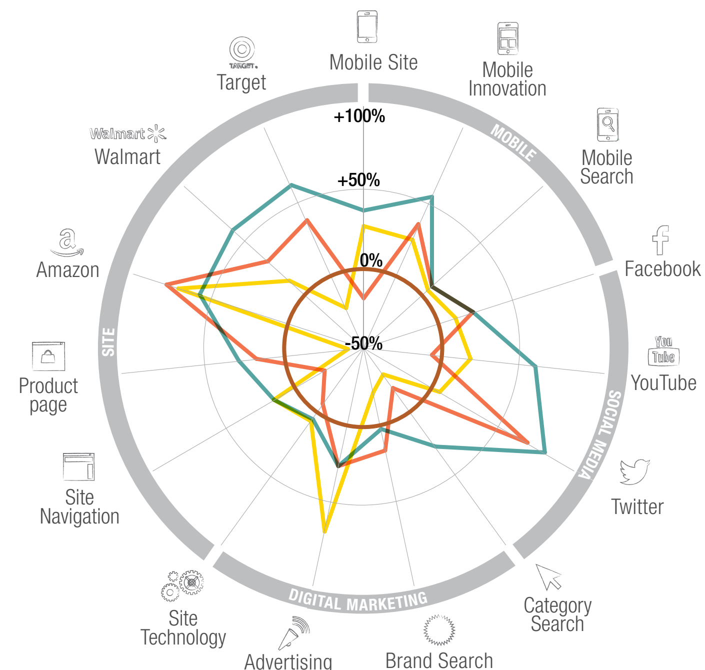
This study attempts to quantify the digital competence of 69 Home Care brands in the U.S. market. Our aim is to provide a robust tool to diagnose digital strengths and weaknesses. Like the medium we assess, our approach is dynamic. Please reach out with comments that improve our methodology and findings.

Regards,
L2

Home Care: Deviation from Average Brand Performance by Dimension

Top Three Brand Portfolios

March 2015 P&G, n=13 Kimberly-Clark, n=4 Georgia-Pacific, n=6 Index Average, n=69



Source: L2, March 2014.

13. "Marketers Look to Digital as Cure-All," Jack Neff and E.J. Schultz, AdAge, February 9, 2015.
14. "World's Biggest Advertiser P&G Shifts Focus to Sampling," Jack Neff, AdAge, November 13, 2014.
15. "P&G's Pact with Amazon Angers Target," Serena Ng and Paul Ziobro, The Wall Street Journal, February 25, 2014.

ABOUT THE RANKING

DIGITAL IQ INDEX® HOME CARE

Methodology

SITE & E-COMMERCE

35%

EFFECTIVENESS OF BRAND SITE

Technology

Search, Navigation, and Customer Service

Product Pages

On-Site E-Commerce & Coupons

E-TAILER INVESTMENTS

Amazon:
Search Visibility, User Reviews, Content & Merchandising, Media

Walmart:
Search Visibility, User Reviews, Content & Merchandising, Media

Other E-Tailers: Target, FreshDirect, Safeway, Peapod

DIGITAL MARKETING

30%

SEARCH, DISPLAY, AND EMAIL MARKETING EFFORTS

Search:
Traffic, Web Authority, SEO & SEM (Branded and Non-Branded)

Advertising & Innovation:
Display, Programmatic, Video Pre-Roll, and Other Brand Campaigns

Email:
Ease of Sign-Up, Frequency, Segmentation/Customization, Trigger Emails

Blogs & User-Generated Content:
Mentions, Sentiment, and Brand Activity on Industry-Specific Outlets (Krazycouponlady, Coupons.com, etc.)

SOCIAL MEDIA

15%

BRAND PRESENCE, COMMUNITY SIZE, CONTENT, AND ENGAGEMENT

Facebook: Community Size, Annual Growth, Programming, Relative & Absolute Engagement

Youtube:
Search Visibility, Channel Experience, Video Views, Virality of Content

Twitter:
Followers, Annual Growth, Frequency, Relative & Absolute Engagement

Emerging Social Media:
Instagram, Pinterest

MOBILE

20%

COMPATIBILITY, OPTIMIZATION, AND MARKETING ON SMARTPHONES

Mobile Site:
Load Time, Compatibility & Functionality, Store Locator & Geolocation

Mobile Search:
SEO & SEM

Mobile Innovation:
Tablet Experience, iOS & Android Apps, Mobile & Tablet Advertising, Mobile Couponing Efforts, Other Brand Initiatives

GENIUS 140+

Digital competence is a point of competitive differentiation. Brands are innovating across dimensions and developing strong relationships with e-tailer partners.

GIFTED 110–139

Brands are experimenting and innovating across site, mobile, and social platforms. Digital presence is consistent with brand image and larger marketing efforts.

AVERAGE 90–109

Digital presence is functional yet predictable. Efforts are often siloed across platforms or innovative only within comfort zones.

CHALLENGED 70–89

Limited or inconsistent adoption of mobile and social media platforms. Sites lack inspiration and utility. Anemic e-tailer investments.

FEEBLE <70

Investment does not match opportunity. Digital properties are dated or nonexistent.

DIGITAL IQ RANKING

DIGITAL IQ INDEX® **HOME CARE**

L2

GENIUS **GIFTED**

RANK	BRAND	DIGITAL IQ
1	Clorox — The Clorox Company	141
2	Tide — Procter & Gamble	138
3	Swiffer — Procter & Gamble	131
4	Lysol — Reckitt Benckiser Group	130
5	Gain — Procter & Gamble	128
6	Charmin — Procter & Gamble	127
7	Downy — Procter & Gamble	124
8	Bounty — Procter & Gamble	123
8	Cottonelle — Kimberly-Clark	123
10	Febreze — Procter & Gamble	122
10	Glad — The Clorox Company	122
12	Seventh Generation — Seventh Generation	116
13	Kleenex — Kimberly-Clark	115
13	Ziploc — S.C. Johnson & Son	115
15	Quilted Northern — Georgia-Pacific	114

GENIUS
Clorox
GIFTED
Tide
Swiffer
Lysol
Gain
Charmin
Downy
Bounty
Cottonelle
Febreze
Glad
Seventh Generation
Kleenex
Ziploc
Quilted Northern
Arm & Hammer
Brawny
Glade
Puffs
Purex
Mrs. Meyer's Clean Day
AVERAGE
Scotch-Brite
Angel Soft
Method
Cascade
OxiClean
Reynolds
Air Wick
Scott
Dawn
Finish
Dreft
Mr. Clean
Sparkle
Bounce
Green Works
Scrubbing Bubbles
Viva
Hefty
Pine-Sol
Dixie
Resolve
CHALLENGED
Windex
Shout
Liquid-Plumr
All
Formula 409
Vanity Fair
FEEBLE
Pledge
Woolite
Renuzit
Scotchgard
Snuggle
Palmolive
Scotties
Drano
Soft Scrub
S.O.S.
Tilex
Kaboom
Ajax
Wisk
Comet
Suavitel
Saran
Sun
Marcal
Fabuloso
Xtra

DIGITAL IQ RANKING

DIGITAL IQ INDEX® HOME CARE

GIFTED AVERAGE

RANK	BRAND	DIGITAL IQ
16	Arm & Hammer — Church & Dwight Co.	113
16	Brawny — Georgia-Pacific	113
16	Glade — S.C. Johnson & Son	113
16	Puffs — Procter & Gamble	113
20	Purex — Henkel AG & Company	112
21	Mrs. Meyer's Clean Day — S.C. Johnson & Son	111
22	Scotch-Brite — 3M Company	108
23	Angel Soft — Georgia-Pacific	107
23	method — Ecover	107
25	Cascade — Procter & Gamble	105
25	OxiClean — Church & Dwight Co.	105
25	Reynolds — Reynolds Consumer Products	105
28	Air Wick — Reckitt Benckiser Group	104
29	Scott — Kimberly-Clark	103
30	Dawn — Procter & Gamble	102
30	finish — Reckitt Benckiser Group	102
32	dreft — Procter & Gamble	101
33	Mr. Clean — Procter & Gamble	100
34	Sparkle — Georgia-Pacific	99
35	bounce — Procter & Gamble	95
35	green works — The Clorox Company	95

GENIUS
Clorox
GIFTED
Tide
Swiffer
Lysol
Gain
Charmin
Downy
Bounty
Cottonelle
Febreze
Glad
Seventh Generation
Kleenex
Ziploc
Quilted Northern
Arm & Hammer
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Angel Soft
Method
Cascade
OxiClean
Reynolds
Air Wick
Scott
Dawn
Finish
Dreft
Mr. Clean
Sparkle
Bounce
Green Works
Scrubbing Bubbles
Viva
Hefty
Pine-Sol
Dixie
Resolve
CHALLENGED
Windex
Shout
Liquid-Plumr
All
Formula 409
Vanity Fair
FEEBLE
Pledge
Woolite
Renuzit
Scotchgard
Snuggle
Palmolive
Scotties
Drano
Soft Scrub
S.O.S.
Tilex
Kaboom
Ajax
Wisk
Comet
Suavitel
Saran
Sun
Marcal
Fabuloso
Xtra

DIGITAL IQ RANKING

DIGITAL IQ INDEX® **HOME CARE**

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AVERAGE **CHALLENGED** **FEEBLE**

RANK	BRAND	DIGITAL IQ
37	Scrubbing Bubbles S.C. Johnson & Son	92
37	Viva Kimberly-Clark	92
39	Hefty Reynolds Consumer Products	91
39	Pine-Sol The Clorox Company	91
41	Dixie Georgia-Pacific	90
41	Resolve Oxi-Action Reckitt Benckiser Group	90
43	Windex S.C. Johnson & Son	89

RANK	BRAND	DIGITAL IQ
44	Shout S.C. Johnson & Son	86
45	Liquid-Plumr The Clorox Company	76
46	all Sun Products Corporation	74
47	409 The Clorox Company	72
48	Vanity Fair Georgia-Pacific	71
49	Pledge S.C. Johnson & Son	69
49	Woolite Reckitt Benckiser Group	69

RANK	BRAND	DIGITAL IQ
51	Renuzit Henkel AG & Company	68
52	Scotchgard Protector 3M Company	65
52	Snuggle Sun Products Corporation	65
54	Palmolive Colgate-Palmolive Company	63
55	Scotties Irving Consumer Products	61
56	Drano S.C. Johnson & Son	59
57	Soft Scrub Henkel AG & Company	58

GENIUS
Clorox
GIFTED
Tide
Swiffer
Lysol
Gain
Charmin
Downy
Bounty
Cottonelle
Febreze
Glad
Seventh Generation
Kleenex
Ziploc
Quilted Northern
Arm & Hammer
Brawny
Glade
Puffs
Purex
Mrs. Meyer's Clean Day
AVERAGE
Scotch-Brite
Angel Soft
Method
Cascade
OxiClean
Reynolds
Air Wick
Scott
Dawn
Finish
Dreft
Mr. Clean
Sparkle
Bounce
Green Works
Scrubbing Bubbles
Viva
Hefty
Pine-Sol
Dixie
Resolve
CHALLENGED
Windex
Shout
Liquid-Plumr
All
Formula 409
Vanity Fair
FEEBLE
Pledge
Woolite
Renuzit
Scotchgard
Snuggle
Palmolive
Scotties
Drano
Soft Scrub
S.O.S.
Tilex
Kaboom
Ajax
Wisk
Comet
Suavitel
Saran
Sun
Marcal
Fabuloso
Xtra

DIGITAL IQ RANKING

DIGITAL IQ INDEX® **HOME CARE**

FEEBLE

RANK	BRAND	DIGITAL IQ
58	SOS – The Clorox Company	57
59	Tilex – The Clorox Company	56
60	Kaboom – Church & Dwight Co.	53
61	Ajax – Colgate-Palmolive Company	48
61	Wisk – Sun Products Corporation	48
63	Comet – Prestige Brands Holdings	46
64	Suavitel – Colgate-Palmolive Company	42
65	Saran – S.C. Johnson & Son	40
65	Sun – Sun Products Corporation	40
67	Marcal – Soundview Paper Company	38
68	Fabuloso – Colgate-Palmolive Company	35
69	Xtra – Church & Dwight Co.	32

GENIUS
Clorox
GIFTED
Tide
Swiffer
Lysol
Gain
Charmin
Downy
Bounty
Cottonelle
Febreze
Glad
Seventh Generation
Kleenex
Ziploc
Quilted Northern
Arm & Hammer
Brawny
Glade
Puffs
Purex
Mrs. Meyer's Clean Day
AVERAGE
Scotch-Brite
Angel Soft
Method
Cascade
OxiClean
Reynolds
Air Wick
Scott
Dawn
Finish
Dreft
Mr. Clean
Sparkle
Bounce
Green Works
Scrubbing Bubbles
Viva
Hefty
Pine-Sol
Dixie
Resolve
CHALLENGED
Windex
Shout
Liquid-Plumr
All
Formula 409
Vanity Fair
FEEBLE
Pledge
Woolite
Renuzit
Scotchgard
Snuggle
Palmolive
Scotties
Drano
Soft Scrub
S.O.S.
Tilex
Kaboom
Ajax
Wisk
Comet
Suavitel
Saran
Sun
Marcal
Fabuloso
Xtra

Private Label: Visibility

Private-label penetration in Home Care varies by product category, ranging from 36.7 percent in bleach (dominated by Clorox), to just 2.7 percent in Air Care. Sales of private-label brands grew 24 percent between 2007 and 2012 due to the economic downturn.[16] In the wake of the recession, the majority of U.S. consumers considered private label to be as good as leading national brands.[17]

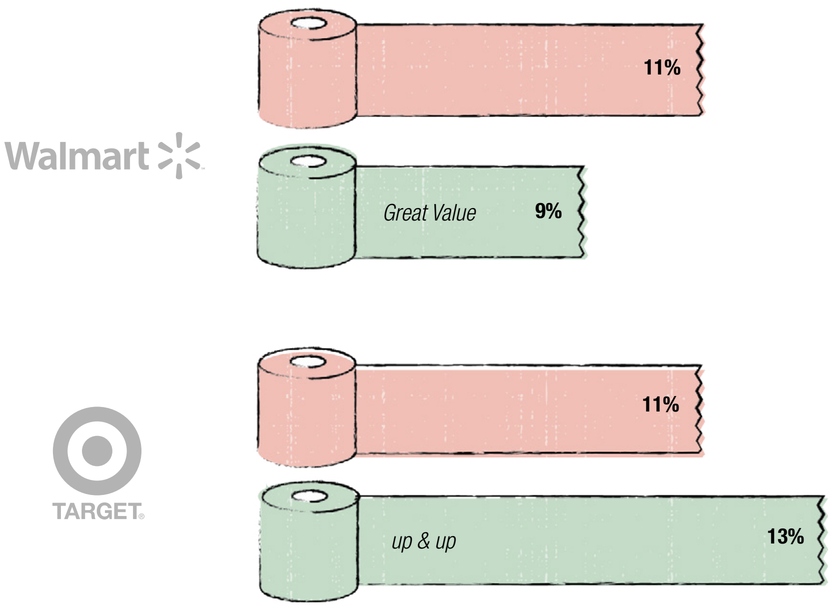
16. "The New Face of Private Label: Global Market Trends to 2018," Gina Westbook, Euromonitor, January 21, 2014.
17. "The 2013 American Pantry Study," Deloitte, 2013.

Retailer promotion of their in-house labels is often in direct competition with the interests of manufacturers. This conflict is most acutely observed on Target.com, where the generic up & up brand has higher average visibility in food storage, dishwashing, paper products, and laundry care than Index brands. These results deviate from category-by-category penetration rates, underscoring the degree of subsidization and sponsorship enjoyed by private-label brands.

Home Care: Comparative Visibility on E-Tailers of Index Brands vs. Private Labels

Average Share of First-Page Results Across Applicable Keyword Searches

January 2015 Index Brand Average Visibility Private Label Brand Average Visibility

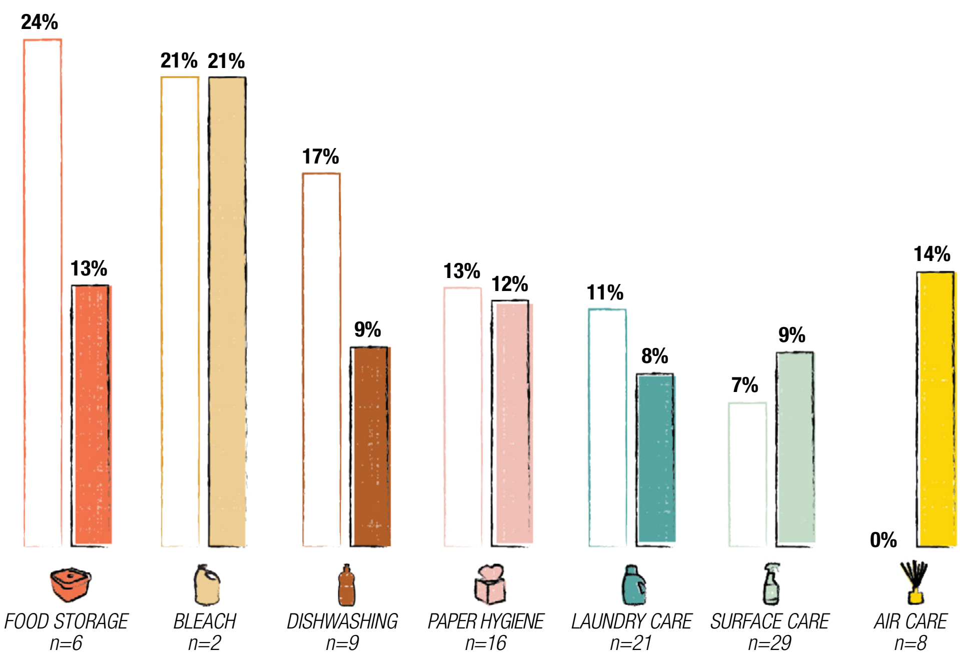


*Note: Average first-page visibility is calculated across relevant non-branded product keywords. Total 38 keyword queries were conducted on Target.com and Walmart.com. Great Value visibility is averaged across 31 search terms. Visibility of up & up is averaged across 32 search terms.

Home Care: Comparative Visibility on Target of up & up Label vs. Index Brand

Average Share of First-Page Results Across Applicable Keyword Searches

January 2015 Index Brand Average Visibility up & up Average Visibility



Search: Category Keywords (Cont'd)

Despite rapid growth in display advertising and a shift toward programmatic buying, search marketing still reigns, representing nearly half of all digital advertising spending in 2014.[18] In 2013, Amazon was the top procurer of Google search ads, spending almost $160 million.[19] Walmart cracked the top 10 ($60 million), and Target ranked in the top 20 ($36 million).

In stark contrast to branded queries, where Amazon demonstrates no paid search activity, the online retailer consistently returns sponsored results for broader category keywords. Eleven percent of total search ads returned for non-brand queries belonged to Amazon, versus three percent for Target, and two percent for Walmart. AOL's search engine (wow.com) purchased eight percent of the ads.

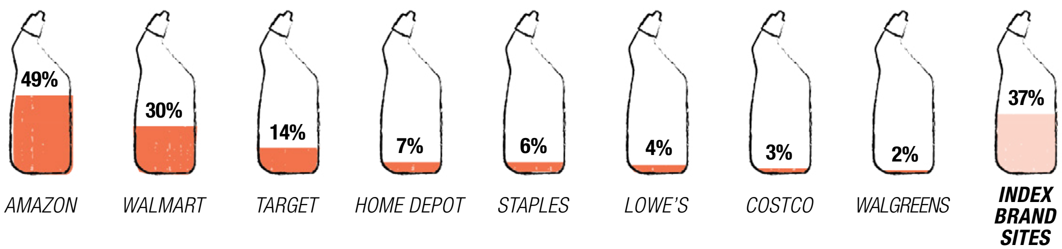
Collectively, Index brands controlled 11 percent of the more than 2,500 ads registered. High-performers include Glad (2.4 percent of ads), Clorox (1.0 percent), and Arm & Hammer (0.9 percent).

18. "Greater Transparency Is Critical To Programmatic Success for Publishers," Forrester Research, Inc., November 2014.
19. "Amazon Tops List of Google's 25 Biggest Search Advertisers," Tim Peterson, AdAge, September 15, 2014.

Home Care: Top E-Tailers by Organic Visibility on Google

Percentage of Category Keywords For Which Site Appears on First Page of Results

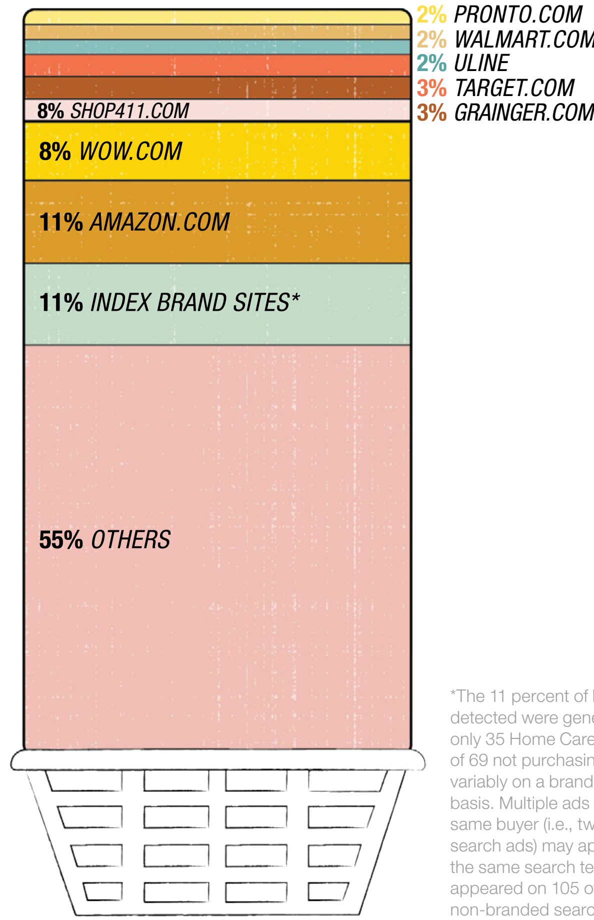
January 2015, n=321 Non-Branded Search Terms



Home Care: Share of Search Ads on Google

Non-Branded Search Terms (e.g. "detergent")

January 2015, n=2,633 Paid Ads Returned for 216 Search Terms*



*The 11 percent of brand ads detected were generated by only 35 Home Care brands (34 of 69 not purchasing), with wide variably on a brand-by-brand basis. Multiple ads from the same buyer (i.e., two Amazon search ads) may appear on the same search term. No ads appeared on 105 of the 321 non-branded search terms.

Pinterest & Instagram

Brands new to this year's Index are driving the higher Pinterest adoption, as nine of 15 new brands are active on the platform (only three legacy brands—Renuzit, Bounty and Dawn—launched accounts). Incremental Instagram adoption this year includes Brawny, Cottonelle, Clorox Green Works, All, Shout, and Snuggle. In Home Care, Instagram and Pinterest have yet to scale, with average community sizes of just 3,300 and 2,300, respectively.

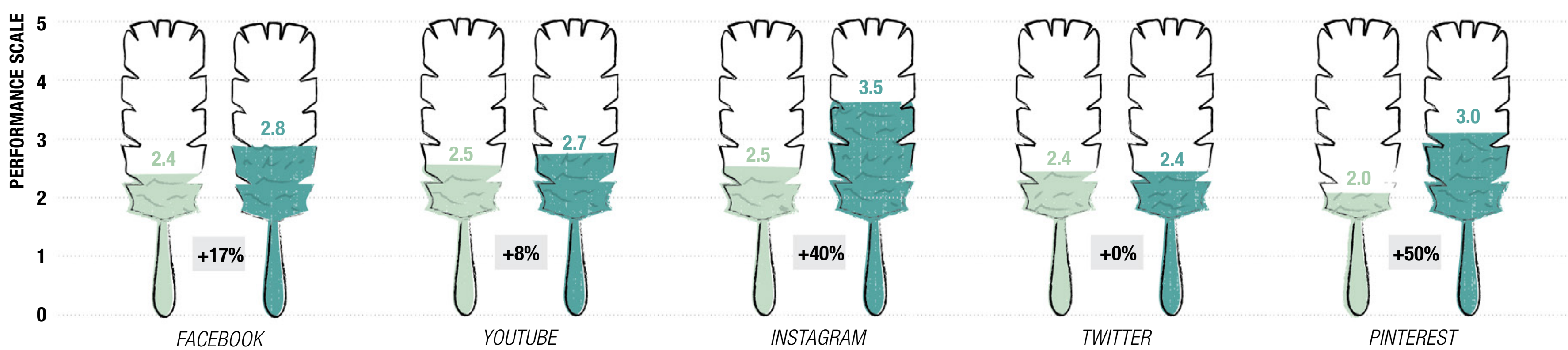
Pinterest's predominantly female user base is largely comprised of women between the ages of 18 and 49, aligning with the target demographic for Home Care customers.[20] Furthermore, 10 percent of Pinterest users engage with brands on the platform, and 17 percent have used it to discover new products.[21] Laundry brand Purex keeps its followers updated on the latest sweepstakes and giveaways with a board dedicated to ongoing promotions.

Home Care brands trail other industries in putting Instagram on their social media agenda: only 20 percent maintain active accounts. Although few brands have found success on the platform, Mrs. Meyer's Clean Day and Seventh Generation have struck a chord with Instagram's young and active user base.[22] Compared to other Index brands, these "green" brands perform, on average, higher across every social media platform save Twitter. Specifically, Seventh Generation and Mrs. Meyer's Clean Day excel at producing a diverse mix of healthy recipes, design tips, and lifestyle content relating to green living. In so doing, these brands escape the narrow confines that define most Home Care content, attracting higher user engagement.[23]

20. "The Social-Media Demographics Report: Differences In Gender, Age, And Income At The Top Networks," Thiago Guimarães, Business Insider Intelligence, September 3, 2014.
21. "Reinventing Retail: What Businesses Need to Know for 2014," Walker Sands Communications, 2014.
22. "Social Media Update 2014," Maeve Duggan et al., Pew Research Center, January 9, 2015.
23. "Three Ways CPG Brands Can Be More Like Lifestyle Brands," Susan Frech. MediaPost, December 15, 2014.

Home Care: Comparative Brand Performance by Social Platform

February 2015 ■ Green Brands* ■ Non-Green Brands



*Includes Seventh Generation, Method, Mrs. Meyer's Clean Day, and Clorox Green Works. N-count for non-green brands on platforms varies—averages include only brands present on platform.

Mobile Site Adoption (Cont'd)

However, the relative low sophistication of the content on mobile sites underscores the checkmark approach favored by many brands investing in mobile optimization. Almost a quarter of U.S. millennial smartphone users, and a fifth of adult smartphone users in general, rely on mobile devices to search for product information while grocery shopping in stores,[24] but 43 percent of Index brands have mobile-optimized sites that include user ratings or reviews (versus 62 percent on desktop).

24. "Digital Shopping List Survey," Allrecipes.com, February 3, 2014.

On an enterprise level, P&G brands deploy the most sophisticated mobile sites assessed: four of the five top-performing mobile sites belong to the P&G portfolio (which features universal investment in mobile-optimization). By contrast, the Sun Products portfolio has completely ignored the mobile web, limiting the recent relaunch of two brand sites (Sun and Wisk) to the desktop.

Home Care: Mobile Site Investments

Percentage of Brands with Following Features

January 2015, n=53 Mobile-Optimized Brand Sites

KEY FINDINGS

DIGITAL IQ INDEX® HOME CARE

L2

SPOTLIGHT

LEADERS & CHALLENGERS

	Leader GLAD	Challenger HEFTY	Leader KLEENEX	Challenger PUFFS	Leader CLOROX	Challenger LYSOL	Leader CASCADE	Challenger FINISH	Leader CHARMIN	Challenger COTTONELLE
AVG MONTHLY SITE TRAFFIC JAN 2014-JAN 2015[1]	152,007	38,843	83,265	27,562	249,140	86,340	92,698	170,877	139,751	122,037
FIRST-PAGE SEARCH RESULTS ON CATEGORY KEYWORDS	15.0%	4.0%	10.7%	3.8%	4.3%	0.0%	28.0%	40.0%	16.6%	6.9%
SHARE OF PAID ADS ON CATEGORY SEARCH TERMS	5.9%	0.0%	1.3%	0.0%	3.8%	0.9%	7.3%	8.2%	2.5%	1.9%
PERCENTAGE OF AD IMPRESSIONS VIA PROGRAMMATIC[2]	26% (trash bag products only)	19% (trash bag products only)	27%	12%	16%	20%	5%	56%	1%	67%
UNIQUE DESKTOP DISPLAY ADS DETECTED[3]	47	9	28	24	169 (including Clorox Wipes)	29	8	12	125	38
FIRST-PAGE E-TAILER RESULTS ON CATEGORY KEYWORDS	24%	11%	24%	32%	12%	12%	21%	15%	26%	17%
SHARE OF CUMULATIVE FACEBOOK INTERACTIONS (JAN 2014 -JAN 2015)	Data Not Tracked	Data Not Tracked	0.5%	4.1%	1.5%	2.5%	0.5%	1.1%	2.7%	2.2%

1. Unique visitors, Compete.com.
2. Ad purchase channel data, from Adomic. Kimberly-Clark and Procter & Gamble have in-house programmatic trading desks. Adomic may not pick up all privately traded impressions.
3. Unique creatives, from Adomic.

TABLE OF CONTENTS

DIGITAL IQ INDEX® **HOME CARE**

Click logo to return here.

Click to jump to:

ABOUT L2

DIGITAL IQ INDEX® **HOME CARE**

L2 business intelligence for digital.

L2 is a member-based business intelligence service that benchmarks the digital competence of consumer brands and retailers. We provide our member brands with actionable, data-driven insights on their digital performance relative to their peers.

RESEARCH

Our 50+ annual reports include:

Digital IQ Index®: The definitive benchmark for online competence, Digital IQ Index® reports assess the digital performance of the top 60-100 brands across 12 industry verticals and 11 geographies. Brands are ranked against their peers on more than 850 data points diagnosing their digital strengths and weaknesses.

Intelligence Reports: Intelligence Reports complement L2's flagship Digital IQ Index® with a deeper dive into the platforms or geographies of future growth. Critical areas of investigation include: Mobile, Video, Emerging Platforms, and Omnichannel Retail.

Insight Reports: Series of topical reports complementing The Digital IQ Index® reports with an in-depth analysis of specific tactics and opportunities.

EVENTS

L2's 60+ global events are the largest gatherings of retail and consumer executives in North America. At our events L2 research leads, academic thought leaders and industry experts provide insight into digital trends, performance and tools.

The Forum: At L2's annual flagship TED-style conference, held each November, CEOs, industry experts, academics and thought leaders speak to innovation and inspiration. Senior executives from the world's most iconic brands are in attendance.

Executive Education Clinics: L2's version of the one-day M.B.A, our quarterly clinics offer members an in-depth look at the issues, trends, strategies and technologies changing the face of digital.

Research Briefings: Held in cities across the world several times a month, these working breakfast or lunch sessions provide members with data and insights from L2's research portfolio.

MEMBERSHIP

For membership information and inquiries: membership@L2inc.com

Upcoming Events

LUNCH: CRM & LOYALTY

March 24, 2015 · Paris

BREAKFAST: CRM & LOYALTY

March 25, 2015 · Geneva

BREAKFAST: CRM AND LOYALTY

March 27, 2015 · London

CLINIC: MEDIA (R)EVOLUTION

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